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Training 3 File 1/8

Summary of Training Hours for On-the-Job Courses, Records Management Analysis (RMA), and Basic Records Management Analysis (BRMA)

PHASE	SUBJECT	Hours RMA Min.	RMA Max.	BRMA Min.	BRMA Max.
1.	Overall Records Management Program	16	16	28	28
2.	Reports Management	40	60	140	180
3.	Correspondence Management	40	60	140	180
4.	Forms Management	40	60	160	200
5.	Management of Record Keeping	60	80	180	240
6.	Records Disposition	60	80	180	240
	Totals	256	356	828	1068

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Check List for Records Management Analysis (RMA)
and Basic Records Management Analysis (BRMA) On-the-Job Training Courses

Phase	Knowledges and Skills to be Acquired	Check
1. AGENCY RECORDS MANAGEMENT PROGRAM		
Briefing on overall Program with respect to: Concept, development, and administration of the Program; laws and regulations; and relationships with other Headquarters Components. RMA - 2 hours BRMA - 2 hours	a. General knowledge of Program background and administration b. Good knowledge of laws and regulations applicable to the Program c. Working knowledge of relationships between Records Management Staff and Operating Offices. d. Good knowledge of relationship between the various functional areas of records management e. Good knowledge of coordinating work within Mgt/S. f. General knowledge of the work in each functional area of records management (e.g. Forms Management, Reports Management, Records Disposition, etc.)	
Study of Laws and regulations; Hoover Commission Reports on paperwork management; Staff reports of accomplishment; Functional Statements RMA - 4 hours BRMA - 16 hours		
Briefings on each functional area of the Records Management Program RMA - 10 hours BRMA - 10 hours		

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Phase	Knowledge and Skills to be Acquired	Check
2. REPORTS MANAGEMENT		
Seminar study, practice problems, and supervised work assignments covering reports analysis and control principles applicable to: a. Reviewing and coordinating proposed requirements for reports. b. Surveys c. Planning and developing reporting systems d. Analyzing existing reporting systems e. Report and directive writing. RMA 40-60 hours BRMA 140-180 hours	a. Working knowledge of reports control records and procedures. b. Working knowledge of reports analysis principles and methods c. Ability to plan, conduct, and present a reports analysis project involving a moderately complex reporting system d. Working knowledge of report and directive writing	
3. CORRESPONDENCE MANAGEMENT		
Seminar, study, practice problems inspection tours, and supervised work assignments covering correspondence management principles applicable to: a. Formats and style b. Supplies and equipment c. Correspondence systems d. Correspondence surveys e. Effective writing	a. Working knowledge of the Staff's role in promoting improved correspondence practices b. General knowledge of Agency correspondence standards c. Working knowledge of typists' supplies and equipment d. Working knowledge of planning and conducting a correspondence survey e. Basic skill in analyzing correspondence with respect to: (1) Developing or improving form and pattern letters (2) Developing indexes to (1) above. (3) Improving format and content of correspondence.	

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Phase	Knowledge and Skills to be Acquired	Check
4. FORMS MANAGEMENT		
Seminar, study, practice problems, and supervised work assignments covering forms management principles applicable to: a. The creation, continuance, identification, procurement stocking, issuance and utilization of forms. b. The design and construction of forms and procedures related thereto. RMA 40-60 BRMA 160-200	a. Working knowledge of the records and procedures for processing requests for approvals of forms b. Working knowledge of requirements for identifying, procuring, stocking, and issuing forms. c. General knowledge of specialty forms and specialty printing and the preparation of specifications therefor. d. Basic skill in analyzing requirements for forms with respect to their: (1) Utilization (Essentiality, consolidation with other forms, elimination, related procedures, and instructions.) (2) Design and construction e. Ability to conduct a forms analysis project involving a moderately complex cut form, such a project to include: (1) Fact finding interview with requester. (2) Development and presentation of recommendations (3) Development of sketch and specifications. (4) Acceptance of product by requester.	
5. MANAGEMENT OF RECORD KEEPING		
Seminar, study, inspection tours, observations, practice problems, and supervised work assignments covering: a. Location of file stations b. File classification plans c. Records Systems d. Supplies and equipment e. Surveys f. Mail control systems g. Vital Materials	a. Good understanding of the "Official File" concept of locating file stations b. Working knowledge of the Agency subject-numeric plan and case filing systems. c. Thorough knowledge of the standard (stock) types of supplies and equipment d. General knowledge of specialty-type supplies and equipment. e. Ability to survey an administrative file at a e. Division or Branch level, such a survey to include: (1) Planning the survey (2) Facts finding interviews (3) Developing recommendations with respect	

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Phase	Knowledge and Skills to be Acquired	Check
5. MANAGEMENT OF RECORD KEEPING CONTD		
	to location of files, file classification plan, and supplies and equipment. (5) Training the file clerks (6) Preparing a survey report f. Working knowledge of mail control systems g. Working knowledge of the Agency VM program and general knowledge of VM repository operations.	
6. RECORDS DISPOSITION		
Seminar, study, inspection tours, observations, and supervised work assignments covering: a. Laws and regulations governing records disposition b. The identification and scheduling of record and nonrecord material. c. Surveys d. Applying Records Control Schedules e. Records Center Operations RMA - 60 - 80 hours BRMA - 180 - 240 hours	a. Thorough knowledge of applicable laws, statutes, and regulations. b. Working knowledge of General Schedules c. Working knowledge of record and nonrecord criteria applicable to existing Agency schedules d. Working knowledge of inventorying and scheduling procedures. e. Ability to survey a small staff office (e.g. General Counsel), such a survey to include: (1) Planning the survey (2) Inventorying the records (3) Developing schedules (4) Securing approval of schedules (5) Preparing schedules in final form (6) Preparing survey report f. Ability to apply a schedule for the retirement or destruction of records. g. General knowledge of Records Center operations.	

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Sample Schedule of Briefing Phase (Phase 1)
of Records Management Analysis and Basic Records Management Analysis
On-the-Job Training Courses

Time	Briefer	Subject
25X1 2 hours		The records problem of the Agency; concept, development, and Administration of the Agency Records Management Program; organization, functions, and personnel of Records Management Staff (RMS); relationships between RMS and Operating Offices; coordinating work within the Management Staff; and results of the Agency Records Management Program.
2 hours		The administrative reporting burden in the Agency; concept, development, and administration of the Reports Management Program; results of the Reports Management Program; relationships with Operating Offices; and coordinating work within the RMS and with other elements of the Management Staff
2 hours		Why a correspondence management program is needed; the Staff's role in promoting improved correspondence practices; the scope of correspondence management; results of the program; relationships with Operating Offices; coordinating work within the RMS and with other elements of the Management Staff.
2 hours		Concept, development, and administration of the Agency Forms Management Program; principles and procedures for centralized forms control; new developments and research in the design and construction of forms; results of Forms Management Program; relationships with Operating Offices; and coordinating work within RMS and with other elements of the Management Staff.
2 hours		Record keeping problems in the Agency; role of the Records Management Staff in improving filing practices and records systems; standardization of filing equipment and supplies and Agency regulations pertaining thereto; new developments in record keeping supplies and equipment; relationships with Operation Offices; coordinating work within the RMS and with other elements of the Management Staff; and results of managing record keeping in the Agency.

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Time	Briefer	Subject
25X1 2 hours	[redacted]	Why a records disposition program is needed; statutory and regulatory requirements; concept, development and administration of the Agency Records Disposition Program; relationships with Operating Offices; coordination of work within the RMS and with other elements of the Management Staff; relationship with Records Center operations; status and results of Agency Records Disposition Program.
12 hours (Total)		

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